

## 2.3 Special Instructions Screen

### Introduction

When sending a form to respondents, survey managers may want to include “special” instructions beyond those normally printed on a survey form. For example, you may have a block on your survey form that asks the respondent to enter a dollar value for “Sales.” If the respondent is classified in one particular NAICS code, you want them to include in their sales figures any sales they make from outlets in shopping malls. If the respondent is classified in any other NAICS code, you may wish for them to exclude any mall-outlet sales figures. Thus, you will want to include a “Special Instruction” on those forms sent to cases classified in one NAICS code, telling them to include mall sales figures and to the second code telling them to exclude mall sales figures. Obviously, you don’t want those instructions on forms going to cases in other NAICS codes. The StEPS Special Instructions screen allows you define and modify these types of special instructions, and gear them towards classifications contained in StEPS (i.e. NAICS, SIC, etc.). Specifically, this screen allows you to:

- Add, delete, and modify special instructions.
- Associate each instruction with one or more survey cases through “key” variables.
- Define a print technology so that the mail out program will output the instruction in the proper format on the form.
- Print Instructions.

### Accessing the Screen(s)

- Click on the SURVEY SPECIFICATIONS button from the StEPS Main Menu.
- Click on the COLLECTION button from the Survey Specifications Menu.
- Select the “4 Special Instructions” option to display the following:

SAS: Special Instructions Review Menu

EDIT UTILITIES HELP EXIT

Disclosure Prohibited - Title 13 and 26 U.S. Code

Date: 05FEB02:09:15:47

Special Instructions Review Menu

Survey: NSURV

Stat Period:1998A1

Single click a row then use Edit/Edit Instruction or Double click on a row to access Edit screen

	TECH	KEY1	KEY1VAL	KEY2	KEY2VAL	TEXT1
1	DEF	ACTIO	V			DEF ACTION V then apply corrections button more tex
2	DEF	ALPHA	555643			rec was DEF ID 0000010020802 text1 text2 text3
3	DEF	ALPHA	555789	BMFA	A	DEF alpha 101990 bmfact A rec was docuprint alpha
4	DEF	BMFA	A	BMFC	199524	TEXT DEF BMFACT A BMFCYC 199524 then f2 key
5	DEF	BMFC	199527			text DEF BMFCYC 199527 then edit pmenu more text
6	DEF	BRIDG	bbbbbb			text DEF bridge bbbbbbb f2 key
7	DEF	BSTAT	1990A1			text DEF BSTATP 1990A1 then f2 key
8	DEF	CENST	censt			text DEF CENST censt then f2 key more text then appl
9	DEF	CITY	DC			2 text in DEF CITY DC more text then f2 key more text
10	DOCUPRINT	ID	00515763555			ON THIS FORM, REPORT SPORTING AND RECREAT
11	DOCUPRINT	ID	00519595655			ON THIS FORM, REPORT SPORTING AND RECREAT
12	DOCUPRINT	ID	23930284155			ON THIS FORM, REPORT SPORTING AND RECREAT
13	DOCUPRINT	ID	36127819455			ON THIS FORM, REPORT SPORTING AND RECREAT
14	DOCUPRINT	ID	55566482955			ON THIS FORM, REPORT SPORTING AND RECREAT
15	DOCUPRINT	ID	83837776455			ON THIS FORM, REPORT SPORTING AND RECREAT
16	DOCUPRINT	SIC	501200			ON THIS FORM, REPORT YOUR INDUSTRIAL LAUND
17	DOCUPRINT	SIC	501211			ON THIS FORM, REPORT CARWASHES, AND AUTO
18	DOCUPRINT	SIC	501212			On this form, report help supply services. You will rec
19	DOCUPRINT	SIC	501222			On this form, report other business services, excluding
20	DOCUPRINT	SIC	501223			On this form, report engineering services. You will rec
21	DOCUPRINT	SIC	501500			On this form, report engineering services, and hotels a
22	DOCUPRINT	SICRC	029 rows seec			

Figure 2.3.1 Special Instructions Review Menu screen

As the name implies, this screen is for reviewing existing instructions. It displays the records currently in the Special Instructions file (PARMLIB.SPECINST) in a data table format. The screen is pretty much read only: You do not have the ability to make changes to the special instructions file from this screen, other than deleting one or more records. You may access the Special Instructions Edit screen (see figure 2.3.2) from this screen, and it is here you may add a new instruction or update an existing one.

## Screen Features and Functionality

### Survey and Stat Period

- Survey and stat period currently being processed.
- These fields are not correctable.
- To change the survey and/or stat period, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).

## Data Table Columns

- The columns in the data table display correspond to the fields (variables) in the Special Instructions file.

COLUMN	DESCRIPTION
TECH	The print technology that will be used to produce the survey form.
KEY1	The StEPS variable that is used to determine which cases will have the instruction printed on the survey form. (i.e. "NAICS")
KEY1VAL	The specific value of the KEY1 variable. (i.e. "422300")
KEY2	Another StEPS variable, used in conjunction with KEY1, to determine which cases will have the instruction printed on the survey form. <sup>1</sup>
KEY2VAL	The specific value of the KEY2 variable.
TEXT	The actual text of the instruction. Each instruction may be up to 1000 characters in length.

- Horizontal and vertical scroll bars are available to help you search the data table to find the instruction you want.

## To Delete an existing instruction

- Click once on the instruction record in the data table to select it.
- Select the "Edit" pmenu.
- Select the "Delete instruction (F6)" option. Alternatively, you may use the F6 function key.

## To Add a new instruction

- Select the "Edit" pmenu.
- Select the "Add instruction" option. The following screen will appear:<sup>2</sup>

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<sup>1</sup>If an instruction is to be applied more narrowly than would be allowed by a discrete value of the KEY1 variable (i.e. only a handful of cases in a given NAICS code), you may define a second variable (KEY2) to further refine your selection criteria.

<sup>2</sup>A pop-up screen will appear over this screen when you select the "Add" option. The pop-up screen tells you that TECH, KEY1, KEY1VAL, and INSTRUCTION are required fields. You must enter values in each of these fields before you can save your new instruction. To close this pop-up window, select either "OK" or "Cancel".

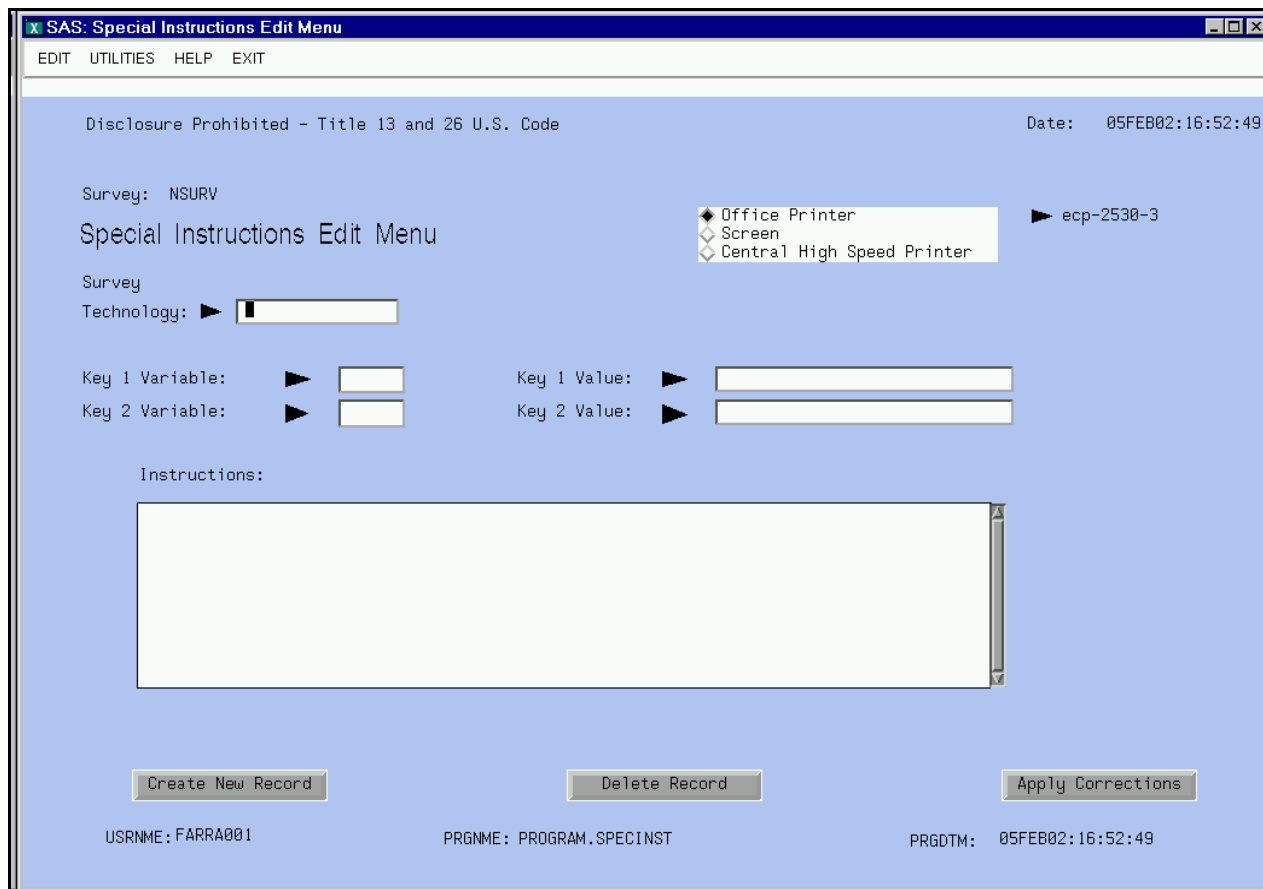


Figure 2.3.2 Special Instructions Edit Menu screen

- The cursor is automatically placed in the “Survey Technology” (TECH) field. In order to create your new instruction, you must enter information in each of the following fields:
  - **Survey Technology (TECH):** Enter the appropriate print technology. You may either key in the value or use the associated pick list.
    - ☞ If you already have a special instructions file, the pick list will be populated with all the values for TECH currently in the file.
    - ☞ If you do not already have a special instructions file, there will be no values available under the pick list. You must key in a value.
    - ☞ Once you have keyed a value for the first time, it is added to the pick list. In any subsequent instructions that use this same value for survey technology, you may either key the value or use the pick list.
    - ☞ This is a required field.
  - **Key 1 Variable (KEY1):** Enter the appropriate “key” variable. This variable is used to determine which cases will have the instruction printed on the survey form. (i.e.

“NAICS”).

☞ Key1 is typically a control variable or some value of RKEY1.

☞ You may either key in the value or use the associated pick list.

☞ This is a required field.

- Key 1 Value (KEY1VAL): Select the specific value of the Key 1 variable you have chosen.

☞ You may either key in the value or use the associated pick list.

☞ The pick list of values is dependent upon the Key 1 variable you select.

☞ This is a required field.

- Key 2 Variable (KEY2): Enter another “key” variable, only if you need to define your selection criteria more narrowly.

☞ This field is not required.

☞ You may not enter a Key 2 Variable if you do not already have a Key 1 Variable defined.

- Key 2 Value (KEY2VAL): Select the specific value of the Key 2 variable you have chosen. This field is not required.

- Instructions (TEXT): Key in the text of the instruction. This is a required field.

- Once you have filled out all of the variables for your instruction, save the instruction. You may do this in one of three ways:

- Click on the “Apply Corrections” button in the lower right-hand corner of the screen.

- Select the “Apply Corrections (F2)” options from the “EDIT” pmenu.

- Press the F2 key.

- NOTE: Do not click on the “Create New Record” button! This will clear the values you have already entered and give you a blank screen in which to create a new instruction.

## To Edit an existing instruction

- Click once on the instruction record in the data table to select it.
- Select the “Edit” pmenu.
- Select the “Edit instruction” option. Either of these options will bring up the Special Instructions Edit Menu screen (Figure 2.3.2).
- Alternatively, you may double-click on the instruction record in the data table and go directly to the Special Instructions Edit Menu screen (Figure 2.3.2).

Once you are in the Special Instructions Edit Menu screen (Figure 2.3.2), the process works just like adding a new record. You must still ensure that the four required fields (TECH, KEY1, KEY1VAL, TEXT) have some value in them before you apply corrections. You may modify any existing value (or add new ones) so long as you do not leave one of these four fields blank. The only real difference between adding a new record and editing an existing record is that you start with a blank screen when adding, but have values already in place when editing.

### Screen Features and Functionality

There are some additional features to the Special Instructions Edit Menu screen that bear mentioning.

#### Informational Fields

- As on all StEPS screens, the **survey** you are processing is displayed in the upper left hand corner.
- Note that there is no **stat period** displayed, as there is in many other StEPS screens. This is because Special Instructions are not (usually) specific to a given stat period.<sup>3</sup>
- **Create New Instruction** button: This button performs the same function as the “Add instruction” option under the edit pmenu. Use this button to bring up a blank record in which to create a new instruction.
- **Delete Instruction** button: Use this button to delete the record/instruction you are currently editing. This button performs the same function as the F6 key or the “Delete instruction (F6)” pmenu option.
- **Apply Corrections** button: You may use this button to apply any corrections you have made in the Edit screen to the current instruction. This button performs the same function as the F2 key or the “Apply corrections (F2)” pmenu option.
- The fields USRNAME, PRGNME, and PRGDTM tell you the person, program and date/time that last changed the special instruction.
- **Print options:** The box in the upper right-hand corner of the screen allows you to output the selected instruction. You have three options:

➤ Office Printer: This is the default setting.

☞ To keep your output from going to the office printer select one of the other options.

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<sup>3</sup>If you want to link a special instruction to a given stat period, you should make STATP the KEY2 variable, with the appropriate period listed in KEY2VAL.

- ☞ Your system default printer is displayed to the right of the box.
  - ☞ You may select a different printer by clicking on the arrow and selecting another printer from the list of available print queues.
- Screen: The record will be displayed in a SAS output window. We recommend you send your output first to the screen, in order to make sure it is what you want before printing.
- Central High Speed Printer: The record will be sent to the central high-speed printer.

## P-Menu

Figure 2.3.1 Special Instructions Review Menu screen

P-Menu	Options	Function
EDIT	Add instruction Edit instruction (F2) Delete instruction (F6)	Add a new instruction. Edit/modify an existing instruction. Delete an existing instruction.
UTILITIES	Next Page (PgDn) Previous Page (PgUp) Top Bottom Print	Move to the next page in the display table. Move to the previous page in the display table. Go to the first instruction in the display table. Go to the last instruction in the display table. Print all records in the Special Instructions file.
HELP	Special Instructions (F1) WhoamI (F7)	Display HELP information on using the Special Instructions Review Menu screen. Display user default and systems information.
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu. Exit to previous screen.

Figure 2.3.2 Special Instructions Edit Menu screen

P-Menu	Options	Function
EDIT	Apply corrections (F2)  Undo  Add record Delete record (F6)	Apply corrections/modifications to the instruction.  Undo corrections/modifications to the instruction.  Add a new instruction. Delete the current instruction.
UTILITIES	Previous record (F4) Next record (F5) Print	Return to the previous instruction. Move on to the next instruction. Print the current instructions.
HELP	Special Instructions (F1) WhoamI (F7)	Display HELP information on using the Form Specification Edit Menu screen. Display user default and systems information.
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu. Exit to previous screen.

